CHANGE MANAGEMENT PLAN TEMPLATES

For HR teams and leaders, implementing change goes beyond setting new directives. It means actively guiding people through each **stage of the journey** to build trust and encourage engagement during organizational adjustments.

Change management plan templates provide clear steps that support these transitions, helping organizations reduce disruption, enhance collaboration, and drive sustainable improvements. Leaders can use the templates to anticipate challenges, document milestones, manage costs, and track progress.

What is change management?

Change management is the process of guiding individuals, teams, and organizations through transitions to achieve desired outcomes. It involves a structured approach that focuses on managing the people side of change during shifts in processes, systems, and technology.

Effective change management emphasizes clear communication, stakeholder engagement, training, and support to minimize resistance and maximize buy-in from team members.

What is a change management plan?

A change management plan serves as a strategic document detailing the steps and actions needed to navigate a new project or organizational shift. It outlines procedures for managing communication, training, and progress to keep people aligned and focused during the change.

Why is a change management plan important?

A change management plan clarifies the change process. It supports a smooth transition to new tools, processes, or strategies by uniting everyone around an objective and helping people manage disruptions effectively. With a thoughtful change management plan, HR teams can:

- **Minimize disruptions:** Change often creates uncertainty and can impact productivity. A well-designed plan helps HR anticipate challenges, reduce disruptions, and maintain business continuity.

- **Boost team engagement and collaboration:** Effective change management plans engage team members through clear communication, resources, and support. This helps people feel valued and informed, fostering a positive culture through complex shifts.

- **Reduce resistance:** Resistance is natural. A structured plan can address common concerns and align teams, making it easier to secure buy-in for evolving organizational goals.

How to create a change management plan

Only **34 percent of change initiatives** have clear success. With a well-structured change management plan that prioritizes communication and support, you can prepare your people for a smooth transition.

1. Build a change management team

Assemble a dedicated team to manage the change process and define each member's roles and responsibilities. For example, assign who monitors operations, who submits change order requests, and who reviews those requests.

The change management team ensures that the change process stays on track, supports people, and maintains two-way communication between executives and team members. It can include people from each department with three key roles:

- **Change champions:** Communicates the change and guides people through the process

- **Change agents:** Plan the day-to-day operations and execution of the change

- **Change controllers:** Receive and approve change requests

2. Document your plan

Divide the plan into two parts: a strategic plan that highlights long-term goals and a tactical plan that breaks down the change into smaller objectives and goals. The plan can also state key elements such as decision-makers, communication strategies, decision-making processes, and key dates.

Include elements like:

- Reason for the change

- Goals and KPIs (key performance indicators)

- Timeline with a schedule, key milestones, and deadlines

- List of actionable tasks

- Stakeholders and their roles

- Departments, processes, and technology the change affects

- Resources the organization needs to implement the change successfully

3. Make an implementation timeline

Attach a timeline to each actionable task in the change management plan. Determine the entire implementation period (e.g., six months) and then assign shorter due dates for specific tasks.

Prioritize tasks by importance before setting deadlines and ensure each deadline feels achievable. These timelines keep the team on track, maintain accountability, and identify if there are slowdowns or bottlenecks, supporting steady progress throughout the change.

4. Recognize your people's achievements

Recognizing and appreciating team members' achievements **reduces resistance to change**, reinforces positivity, and encourages faster adoption. Implement an employee recognition program that rewards people for achieving milestones and predetermined KPIs. You can offer gift packages, **company merch**, or public acknowledgment for people who meet or exceed their goals.

5. Track change management success

Track change management success by setting KPIs to measure the effectiveness of the plan and process. Establish a KPI dashboard for the change management team to monitor regularly that allows for ongoing assessment.

Track KPIs like:

- Resistance/rejection rate

- Adoption rate

- Time to adoption

- Employee training effectiveness

- Change cost

- Employee engagement

- Change success rate

- Stakeholder satisfaction

- Customer satisfaction

- Change **return on investment** (ROI)

> Recognize that no one-size-fits-all KPI exists: Each KPI should align with the overall change goal. For example, if your goal involves improving your team member's satisfaction by implementing a new rewards and recognition program, satisfaction levels would be a great KPI, but you might not measure customer satisfaction.

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Change management plan templates

Using structured templates can simplify the change management process, providing a clear roadmap for each stage of change. Let's take a look at some templates you can use.

1. Change proposal template

Organization name	
Date	
Change proposal	
Proposed change	
Reason for change	
Expected outcomes	
Benefits of change	
Potential risks	
Estimated timeline	
Estimated costs	
Additional considerations	

A change proposal template explains the reason and benefits of the change. It provides a standardized format for detailing the purpose, scope, benefits, potential risks, and resource requirements. This template helps stakeholders understand the rationale behind the change, assess its potential impact, and make informed decisions about whether to proceed.

What this template includes:

- **Proposed change:** Explain the change, what people, teams, or departments it will affect, and when it will begin

- **The rationale for the change:** Review the necessity of the change, its pros and cons, and answer possible concerns people will have

- **Expected outcome(s):** Detail the primary impact(s) of the change and any indirect effects

- **Estimated timeline:** Include an estimate of how long the change will take and a general timeline

- **Estimated total cost:** Consider any costs the company will incur, such as technology, consultation, or additional labor costs, and include estimates for all of them

- **Additional considerations:** Cover any other factors that may influence the change like regulatory requirements, dependencies on other projects, or impacts on company culture

2. Change management leader template

Organization name	
Date	
Proposed change	

Change leader	Title	Role in change	Reason for involvement	Key responsibilities
Person 1				
Person 2				
Person 3				
Person 4				

To help people accept change with minimal resistance, build a team of influential leaders to guide, support, and address concerns. Use a change leader template to identify each leader, along with their role, key responsibilities, and purpose for involvement.

For example, a change leader can be your head of HR. They can educate people about the change, organize training sessions and workshops, and provide continuous support through regular check-ins.

What this template includes:

- **Change leaders:** Choose your change leaders, ideally people with great communication skills and organizational influence who are ready to champion the change.

- **Roles and responsibilities:** Clearly explain each change leader's roles, including their daily, weekly, or monthly responsibilities.

- **Reason for involvement:** Explain the why behind choosing someone as a change leader. Highlight their strengths and why they're the best person for the job.

3. Change management communication plan

Change Project Name	
Change Project Owner	
Change Communications Approver(s)	
Last Updated	

Please identify the stakeholders for each communication, the reason for the communication, and a description of the required communication.

Phase	Communication / Event	Estimated Date	Status	Targeted Stakeholders	Reason for Communication	Methods of Communication	Key Messaging	Communication Copy
Assessment and Planning	Change announcement	01-20-2021	In process	All hands				
	Stakeholder survey invitation	6-25-2021	Not started	Support team				
Implement Change	Training deck		Not started					
	Updated support documentation		Not started					
	Training program invitation		Not started					
Monitor Ongoing Change and Metrics	TBD		Not started					
	TBD		Not started					

Source

A change management communication plan refers to the organization's strategy for communicating change to key stakeholders and team members. It outlines key situations that call for communication, assigns change leaders responsible for each message, identifies the target audience, and specifies methods for delivering the messages.

The change management model you're using will influence your communication strategy. For example, **Kotter's** change management theory encourages top-down communication, while the **ADKAR** model takes a bottom-up approach.

Communication plans include:

- **Your change management model:** Explain which change management model you're using and how it will impact communication.

- **Change leaders:** List the people responsible for communicating change. For example, department heads can explain to their people how the change specifically affects them.

- **Situations that require communication:** Explain what events require communication. Examples include deadline announcements, progress reports, and training.

- **Method of communication:** Note the communication channels for every event that requires communication.

- **Target audience:** Define the intended audience for each communication event.

- **Reason for communication:** Explain why communicating the situation is important and the outcome of the communication.

4. Gap analysis template

	Current state	Future state	Gap	Actions to close gap
What	What happen?	What should it look like?	What is different?	What will be done to address the gap?
Where	Where is the confusion	Where will it change?	Where will it be different?	Where will it be addressed?
When	When is it done?	When will it change?	When are the differences needed?	When it will be addressed?
Who	Who does the work?	Who will do this?	Who will identify the gap?	Who will make the decision?
How	How is it sequenced?	How will it be timed and resources?	How will the gap be improved?	How will it be rolled out?

Source

A gap analysis template helps HR leaders assess where the business stands, where it needs to go, and what actions will drive this progress. Use gap analysis insights to provide a foundation for additional planning.

Gap analysis templates include:

- **Current state:** Describes the organization's current position and why it needs to change.

- **Future state:** Explain the outcome of the change and benefits your people can expect.

- **Gap percentage:** Measure the percentage difference between the current and future state. For non-quantifiable gaps, you can give a reasonable estimate.

- **Action to take:** Define what can be done to reach the future state, such as hiring more people or switching to new technology.

- **Change leader:** Specify who will lead each action.

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5. Cost-benefit analysis template

COMPANY NAME				DATE CONDUCTED		
PROPOSED PRODUCT/INITIATIVE/SERVICE				COMPLETED BY		

QUANTITATIVE ANALYSIS	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL
NON-RECURRING COSTS						
Hardware						$ -
Servers						$ -
Desktop						$ -
Telecommunication Equipment						$ -
Software (Packaged or Custom)						$ -
Computer Room Upgrades						$ -
Furniture and Fixtures						$ -
Project Organizational/Support Costs						$ -
Planning (upon Approval)						$ -
Procurement						$ -
Contract Negotiations						$ -
Labor						$ -
Infrastructure						$ -
Development						$ -
Business Process Owners (Users)						$ -
Management						$ -
Training of Employees (Pre-Implementation)						$ -
Transition Costs (Parallel Systems)						$ -
Post-Implementation Reviews						$ -
TOTAL NON-RECURRING COSTS	$ -	$ -	$ -	$ -	$ -	$ -
RECURRING COSTS						
Hardware/Software						$ -
Software Maintenance and Upgrades						$ -
Computer Supplies						$ -
Desktops (Incremental to the Project)						$ -
Help Desk Support						$ -
Ongoing Additional Labor						$ -
IT Staff Costs (including Benefits)						$ -
User Training						$ -
Other						$ -
Telecommunications						$ -
Office Leases						$ -
TOTAL RECURRING COSTS	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL COSTS	$ -	$ -	$ -	$ -	$ -	$ -

Source

A **cost-benefit analysis** weighs a project's costs and benefits against each other to determine whether it's worth pursuing. Changes require careful evaluation to ensure ROI. A cost-benefit analysis template helps HR leaders assess whether investing time, resources, and people in a change will yield valuable results.

What cost-benefit templates include:

- **Quantitative costs:** Include production costs, labor costs, material costs, and utility costs

- **Quantitative benefits:** Explain the fiscal benefits and why they're worth the investment

- **Qualitative benefits:** Review the non-monetary benefits an organization will enjoy, like higher customer satisfaction, lower employee turnover, and improved stakeholder trust

6. Change management plan budget template

Source

Use a budget template to estimate the people, material resources, hours, and other resources needed for successful change. Include a column for actuals to measure budget variance post-project and apply those insights to future change initiatives.

Change management plans include:

- **Project tasks:** Break down the project into achievable tasks

- **Cash budget for each task:** Estimate how much you expect to incur to complete each task successfully

- **Labor hour budget:** Budget the amount of time it will take for the task to be completed and the cost of labor

- **Physical resource budget:** Include how many resources to allocate for each task and the cost of the resources

- **Total budget amount:** Write the total cost of cash, labor, and physical resources

- **Actuals:** Include the amount you spent on the project

- **Variance:** Include the difference between what you planned to spend and what you actually spent

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7. Change management tool template

ORGANIZATION			CHANGE MANAGEMENT MODEL(S):	
TOOL	**PURPOSE OF TOOL**	**CHANGE LEADER**	**USERS**	**COST OF TOOL**
Tool 1				
Tool 2				
Tool 3				

[Source](#)

Change management tools help organizations automate parts of the change process and optimize workflows. The change management tool template contains all the tools people will use, who will use them, why they're necessary, and the costs involved.

Change management tool templates include:

- **Tool:** List all the tools people will use to implement the change. These can be complex tools like a human resources information system (HRIS) for managing HR processes during organizational changes or simple tools like Google Docs for documentation.

- **The tool's purpose:** Explain why the tool is necessary for the change. For example, you might need the HRIS to streamline onboarding processes for new joiners during the transition.

- **Who will use it:** List who will use the tools. For example, everyone in the organization might use a messaging app for communication, but only finance teams will use accounting software for managing budget changes and expenses.

- **The tool's cost:** Include an estimate of how much the tool will cost, including implementation and any ongoing fees beyond the initial investment.

8. Change management training plan template

		CHANGE MANAGEMENT MODEL(S):			
AUDIENCE	**INTENDED OUTCOME**	**METHOD OF DELIVERY**	**TOOLS & EQUIPMENT**	**TRAINING LEADER**	**PLANNING TIME**

[Source](#)

The change management training plan template helps you prepare for any training sessions team members need. Explain the type of training, the delivery method, the target audience, the training tool, who's in charge, and how long it takes.

Change management training plans include:

- **Training type:** Start with the goal and type of the training.

- **Target audience:** List who's participating in the training.

- **Duration:** Estimate how long the training will take.

- **Delivery method:** Explain how team members will receive the training. Will it be in person, online, on-demand, or another method?

- **Training tool:** Cover what tools you'll use to deliver the training. Reference your change management tool template here.

- **Training leaders:** Note which leaders initiate changes and oversee training sessions. Note who's responsible for tracking people's performance.

- **Costs:** Estimate how much it will cost to deliver the training.

9. Change order form or request form template

Project Name:	
Project Owner:	
Year/Quarter/Date:	

Change Request Form [COMPANY]

Change Description

Change Initiator	
Description of Change	
Reason for Change	
Priority	*(High/Medium/Low)*
Impact on Deliverables	
Impact of Change Resistance	

Source

The change request form, or a change order form, helps organizations maintain control over all change processes. It prevents a single team or department from making changes without approval from key decision-makers.

Change order forms include:

- **Project name:** Start with the title of the change project

- **Date:** Include the date of submission

- **Requested by:** Add who requested the change

- **Reason for change request:** Review reasons for a change request

- **Impact of the change:** Explain what the change aims to achieve

- **Approval/rejection of request:** Document whether the request received approval or was rejected

- **Date of approval/rejection:** Record the approval or rejection date for each request

10. Change implementation plan template

| Project Name:		Month 1				
Change Deliverable	Responsible	Wk1	Wk2	Wk3	Wk4	Wk1
Momentum						
Engage key stakeholders for a discussion						
Stakeholders mapped						
Vision statement						
Key communications (see next Tab)						
Detailed impact assessment						
Communications and change plan						
Feedback loops prepared						
Training developed (if required)						
Briefing packs prepared						
Stage 3: Implementation and Reinforcement						
Communications issued						
Teams briefed						
Training undertaken						
Checkpoint meetings						
Monitor results						
Stage 4: Review and Learn						
Review undertaken						
Change summary report						

Source

The implementation plan template outlines every task, schedule, resource allocation, cost estimate, and budget needed to drive the change. It also functions as a checklist, helping change leaders monitor progress and assign team members, set due dates, and update task statuses.

Change implementation plans include:

- **Tasks:** List all tasks to complete in each implementation phase

- **Priority levels:** Assign priority to various tasks like critical, high, low, and medium priority

- **Start date:** Indicate when the task will begin

- **End date:** Provide the end date of the task

- **Assignments:** Note who has responsibility for each task

- **Progress:** Share regular progress updates for each task, noting whether it's on track or facing delays

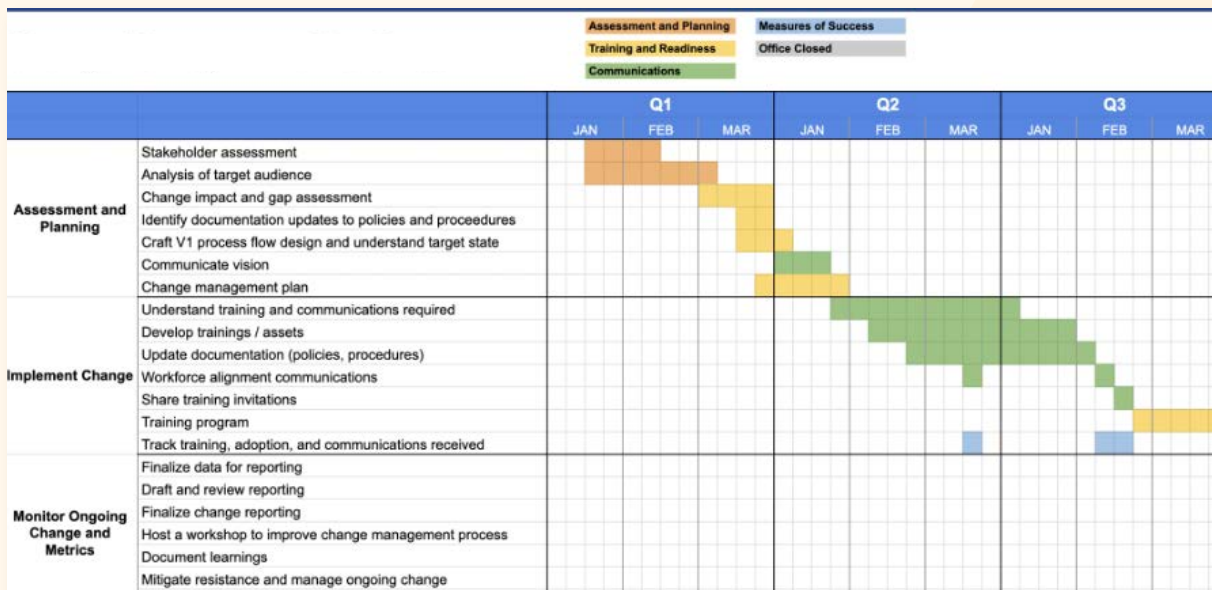## 11. Change management resource template
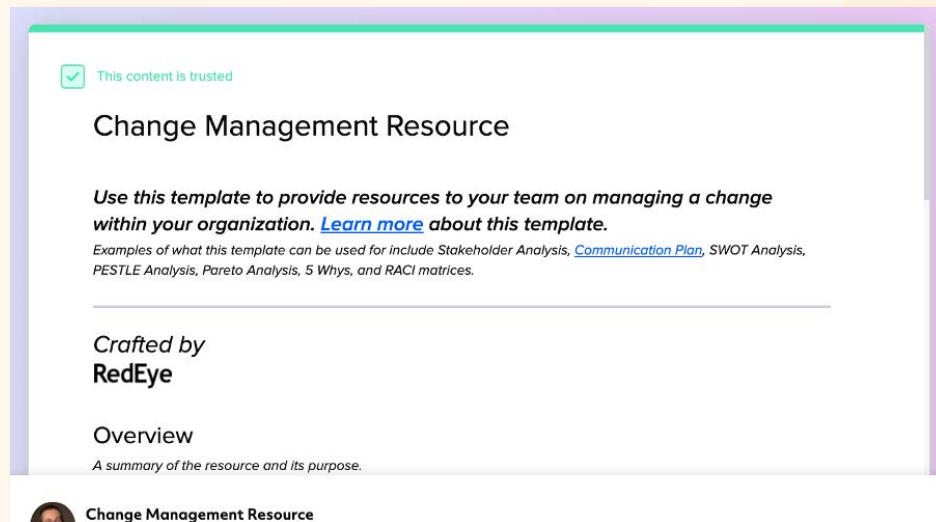
Source

The change management resource template ensures an organization has the resources it needs to implement change initiatives. It covers the resources needed, their purpose, and who will manage them.

Change management resource templates include:

- **Resource type:**

    - **Training and development resources:** Specify training programs, workshops, seminars, and learning materials

    - **Templates:** Provide templates to standardize processes during the change

    - **Technology and tools:** Include the software, platforms, or tools people can use to manage and automate the changes

- **Purpose of each resource:** Explain the importance of each resource, how to use it, and when to use it.

- **Target users:** Include what individuals or departments will use the resource. For example, the finance team will likely be in charge of managing financial resources.

- **Subject matter experts:** List any team members with advanced experience using the resource.

- **Example:** Provide an example of how to use the resource.

12. Change management timeline template

		Q1			Q2			Q3		
		JAN	FEB	MAR	JAN	FEB	MAR	JAN	FEB	MAR
Assessment and Planning	Stakeholder assessment									
	Analysis of target audience									
	Change impact and gap assessment									
	Identify documentation updates to policies and proceedures									
	Craft V1 process flow design and understand target state									
	Communicate vision									
	Change management plan									
Implement Change	Understand training and communications required									
	Develop trainings / assets									
	Update documentation (policies, procedures)									
	Workforce alignment communications									
	Share training invitations									
	Training program									
	Track training, adoption, and communications received									
Monitor Ongoing Change and Metrics	Finalize data for reporting									
	Draft and review reporting									
	Finalize change reporting									
	Host a workshop to improve change management process									
	Document learnings									
	Mitigate resistance and manage ongoing change									

Source

A change management timeline template creates a schedule that breaks the change processes into measurable phases and sets a duration for each phase. For example, phase one might communicate the change and set up tools; phase two could involve training team members and gathering feedback to ensure they're prepared; phase three could be implementation, and so on.

Change management timeline templates include:

- **Change phases:** Define the various stages or periods, each with their specific duration.

- **Duration:** Estimate the expected timeline for each phase. How long does the phase last?

- **Start date:** State when you want each phase to begin.

- **End date:** State when you expect the phase to end. This date should accommodate time for progress reviews.

13. Change log template

	Change No.	Category	Priority	Description	Approval status	Estimated cost	Implementation status	Notes
3								
4	1	Product	Low	Customer wants blue button instead of green one	Approved	200,00	In work	
5	2	Product	High	PDF export of timesheet should be possible	Pending review	3.500,00	Open	
6	3	Responsibilies	Critical	Form development to be done by contractor, client does not have any available resources	Approved	12.000,00	Open	Can be taken over by Matt and Lisa
7	4	Process	Medium	Returns handling process must be reviewed together with IT team	Open	???	Open	
8	5	Process	Medium	How do we handle spare parts orders from EU customers? Define process	Open	???	Open	Workaround available
9	6	Product	High	Daily sales report to be taken over from legacy system	Pending review	???	Open	Sam to provide estimate
10	7	Product	Medium	Customer correspondence should automatically be archived in Azure	Open	???	Open	
11	8	Process	Low	Include log-in link on support page	Open	-	In work	
12	9							
13	10							
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								

Source

A change management log template tracks change order requests. It details who requests a change, the request date, its priority, and its progress status. It should also document approvals, updates, and any relevant communication.

Change management logs include:

- **Change request:** Explain the change request with its name, reason for the change, and impact of the change.

- **Date:** Add the change request date.

- **Priority:** Assign a priority to each change request, like high, medium, and low.

- **Progress status:** Include a progress status to show if the change is complete, in progress, not done, or blocked.

- **Change scope:** Cover the extent of the change. What will the change affect? Will it affect the entire organization, one department, division, or more?

14. Change impact template

Estimate how the suggested change will affect your organization financially and non-financially. The change impact template allows you to list all variables, such as team members, culture, workflows, finances, resources, and the potential positive or negative impact a change will have on them.

Change impact templates include:

- **Scope of the change:** Determine the extent and complexity of the change. Does it fit within current processes with minimal adjustments, or does it require a complete overhaul?

- **Variables:** Identify all variables affected by the change and describe the positive and negative impacts in detail.

- **Expected risks:** Outline potential risks, including high resistance from team members, workflow disruptions, financial losses, and other possible challenges.

Build a successful change management plan

A great change management plan allows you to implement change smoothly and offers many post-change benefits, like:

- Higher success rate of change

- Faster adoption

- Less resistance to change

- Higher productivity, employee engagement, and employee satisfaction

- Upskill opportunities for team members

With a solid plan in place, you're prepared for the change process, have visibility into each phase's progress, and can anticipate and mitigate any surprises.

Change management plan FAQs

What are the 7 R's of change management?

The seven R's of change management include:

- **Reason for the change:** What reason drives this change, and what issue or opportunity does it address?

- **Risks involved in implementing the change:** What potential risks and challenges accompany this change?

- **Resources required to execute the change successfully:** Which resources—time, budget, tools, skills—enable successful implementation?

- **Raised or suggested changes:** Who initially raised or suggested this change, and what motivated the suggestion?

- **Return of the change:** What measurable benefits or returns come from making this change?

- **Responsible for implementing change:** Who holds responsibility for carrying out and managing the implementation process?

- **Relationship between this change and any other changes:** How do this change and other planned initiatives interact, align with, depend on, or influence each other?

What are the 5 C's of change management?

The five C's of change management include:

- **Communication:** Keep stakeholders informed, address the change, and share the purpose and benefits of the change

- **Commitment:** Foster a shared understanding of the change goals and gain active support from stakeholders such as HR leaders, department heads, and team members

- **Culture:** Address the existing company culture to align change with the organization's values and norms

- **Capability:** Assess the company's current capabilities, identify gaps, and provide training or resources to support the successful adoption of change

- **Consistency:** Maintain consistency in actions, messaging, and implementation to help build trust and credibility

What are the 5 P's of change management?

The five P's of change management include:

- **Purpose:** Purpose answers the core questions, what are we doing, why are we doing it, and what do we hope to achieve?

- **People:** People drive the change. Success rests on the commitment of the people involved and impacted. From start to finish, the change process depends on their buy-in and alignment with company culture.

- **Process:** Process defines how the organization operates now and how it will adapt and grow. It refines current practices, removes inefficiencies, and helps build a future state rooted in best practices.

- **Platform:** Platforms include all the essential tools that support the organization's work.

- **Project:** The project phase organizes change into actionable steps and aligns leaders and teams on shared goals. Through structured management and clear communication, the project framework turns strategic vision into measurable outcomes for the organization.

Meet Bob

At HiBob, we've built a modern HR platform designed
for modern business needs—today and beyond.

We focused on building something that is robust yet intuitive
and easy-to-use, which has led Bob to be the platform of choice
for thousands of fast-growing modern, mid-sized organizations.

For HR

It delivers automation of many common processes, allows greater
oversight and visibility of the business, and centralizes all people
data in a secure, user-friendly environment.

For managers

It provides access to data and insights to help them
lead more effectively and streamline processes.

For employees

It's the tools and information they need to connect,
develop, and grow throughout their journey.

In a short time, Bob can be deployed to enable communication, collaboration, and
connectivity that drives stronger engagement, productivity, and business outcomes.

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